

The European market potential for fresh cassava

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Europe completely depends on a foreign supply for its cassava. Countries with a large population of traditional and ethnic consumers, such as Spain, France and the United Kingdom, remain the main target countries. Increasing knowledge about the different uses of cassava drives the growth among new consumer groups. This helps to get this exotic root from a mostly ethnic ingredient to the mainstream fresh market.

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1. Product description

Cassava (scientific name: *Manihot esculenta*) is a root crop, also known as (or similar to) *manioc*, *yuca*, *balinghoy* or *kamoteng kahoy* (in the Philippines), *mogo* in Africa, *mandioca*, *tapioca-root* (predominantly in India), *aypu*, and *boniato*.

Cassava varieties can be both sweet and bitter and they grow in tropical regions. However, only the sweet variety is sold on the fresh fruit and vegetable market in Europe. The trade statistics include dried, frozen and chipped cassava or cassava pellets.

Figure 1: Cassava types and Harmonized System (HS) code

Harmonized System (HS) code	071410 Manioc (cassava) Fresh, chilled, frozen or dried roots and tubers of manioc "cassava", sliced, unsliced or in the form of pellets
	Sub-codes and products 0714 1000 10 Of a kind used for human consumption, in immediate packings of a net content not exceeding 28 kg, either fresh and whole or without skin and frozen, sliced or unsliced 0714 1000 91 Pellets of flour and meal 0714 1000 99 Other

Picture by [Amada44](#), [CC BY 3.0](#), via Wikimedia Commons

2. What makes Europe an interesting market for cassava?

A differentiation in the market for roots and tubers and the growing use of cassava sub-products provide opportunities for fresh cassava. For cassava, Europe depends completely on a foreign supply.

The European market for cassava continues to increase

The European demand for cassava is growing, as shown by an increased import value. This shows that cassava is gradually becoming a more mainstream product.

The European (EU, EFTA & UK) import value of cassava from non-European sources increased from €26.6 million in 2016 to €42.4 million in 2020. The total trade volume follows a similar trend with an average growth of 15%. The strongest increase was registered in the last two years. It totalled roughly at a net demand of around 50,000 tonnes.

Cassava is quite niche compared to other root and tuber vegetables such as potatoes and sweet potatoes. But there is potential for growth if differentiated properly – especially considering sweet potato had a similar import value in 2005 as cassava has now.

An additional advantage for cassava exporters is that it is a tropical crop, unsuitable for European cultivation. This means Europe depends entirely on a foreign supply as shown in figure 2.

Cassava products help increase product awareness

The demand for cassava and cassava products is diverse and includes more than just the fresh fruit and vegetable segment. Besides the import of (fresh) whole roots, there is also a significant import of processed cassava or manioc. The European trade volume of manioc starch has passed 60,000 tonnes and manioc or tapioca flour has grown from less than 10,000 tonnes in 2016 to almost 23,000 tonnes in 2020.

The presence of these dry cassava ingredients, as well as consumer products made with these ingredients, can help increase consumer knowledge of cassava in general. This will improve the chance of consumers trying fresh cassava. But exporters should also consider diversifying their supply of fresh cassava with the export of manioc starch and flour.

Tips:

Specialise in fresh cassava if you can. You can broaden your market by diversifying your supply of fresh cassava with dried, frozen and processed cassava products – or combine it with other roots and tubers such as yams, taro and sweet potatoes. However, remember that fresh cassava export is a specialisation and more difficult to achieve than exporting frozen or processed cassava products or less perishable roots and tubers.

Follow the market developments through different news websites and information sources such as [Freshplaza](#), [Eurofruit](#), [FreshFruitPortal](#) and [Fruitrop](#) (full access only through membership).

3. Which European countries offer most opportunities for cassavas?

The largest markets for cassava are countries with large ethnic groups and traditional cassava consumers such as Spain and France. The United Kingdom also has an open market for exotic roots. Furthermore, besides

fulfilling their local demand, the Netherlands, Belgium and Portugal also re-export cassava.

Germany is not yet close to the volumes of the main cassava importers, but is on its way to becoming a bigger market as well.

Traditional consumption

Traditional consumers with high consumption levels include people with descentance from Ghana, Cambodia, Angola, Nigeria and the Democratic Republic of the Congo. Latin American consumers also have a relatively high consumption of fresh cassava. African populations are well represented in France and the UK. Latin American consumers are often found in Spain and Portugal.

In terms of destinations, [nearly three-quarters \(72%\) of Europe's sub-Saharan immigrant population is concentrated in just four countries](#): the UK (1.27 million), France (980,000), Italy (370,000) and Portugal (360,000).

Spain: Europe's largest market for fresh cassava

Spain offers the largest end-market for cassava in Europe (Cassava is often locally referred to as 'yuca'). Especially in the last few years, 2019-2020, there has been a growing demand for both fresh and dried cassava.

Most of the cassava is supplied by Costa Rica, which is responsible for 90% of the non-European import value. There is a growing supply from Thailand, but this mostly concerns dried cassava chips, and smaller volumes (average up to 100 tonnes) are imported from Colombia and Ecuador. Additionally there is re-exported cassava that comes through the Netherlands and Portugal.

Spain is a relatively easy target market for Latin American countries because of the cultural link and the Latin population residing in the country. Fresh (non-processed) cassava is a popular food among these consumers. While people from Asian and African descent often process cassava for different food preparations, Latinos are probably the biggest purchasers of fresh cassava for frying and cooking.

Cassava has been on the rise in recent years, not only targeting Latin-American residents, but also reaching Spanish households – a trend that will gradually continue. The awareness of cassava is increased through several added-value products such as frozen cassava from the Hispanic-American [Goya brand](#) and cassava crisps from the Costa Rican [Soldanza brand](#). This also helps the consumption of fresh cassava, for which import mainly relies on importers specialised in exotic fruit and vegetables such as [Cultivar](#) and [CMR Group](#).

Netherlands: re-exporter of fresh cassava

Most of the cassava that comes in to Europe finds its way through the Netherlands. The country is an important trade hub for exotic fruit and vegetables. It has the logistical infrastructure in place to distribute cassava throughout Europe, including France, Italy, Germany and Spain.

Dutch cassava imports reached a value of nearly €11 million in 2020. Costa Rica is the main supplier, with a stable volume of around 8,000 tonnes per year. It is the country of preference for fresh cassava. But the Netherlands also offers trade opportunities for fresh, frozen or dried cassava (chips/pellets) from Thailand and several minor supply countries, including China, Vietnam, India and recently growing volumes from Ecuador and Indonesia.

Up to two thirds of the cassava is re-exported. The remaining part is marketed locally with ethnic consumers and as an exotic root vegetable in conventional supermarket channels. There is a significant subset of the Dutch population that originates from Surinam and Indonesia, and they are very familiar with cassava for example for making 'teloh' (fried cassava) or 'bojo' (Surinam cake). As a result there are importers of Surinam vegetables as well as exotic specialists that increasingly cater to a wider consumer group.

France: strong consumption due to ethnic population

France is a typical end market for fresh cassava. Being an exotic and niche product for the average French consumer, most of the consumption can be expected among the large number of French-African residents.

Some 3 to 3.5% of the total population of 65 million is believed to come from sub-Saharan Africa, where cassava is a common staple food. France counts a large number of people from Senegal, Ivory Coast, Cameroon and Congo, which will ensure a stable consumption of cassava products in the future. This consumer group is reached by ethnic food buyers that often operate on wholesale markets such as Rungis.

Costa Rica supplies most cassava, reaching almost 5,700 tonnes or €5.2 million in 2020. Cameroon is the second-largest supplier of cassava to France. Unlike Costa Rica, however, the import from Cameroon is much more focused on processed cassava such as 'water fufu' (a cassava porridge) and its byproducts, cassava sticks and 'chikwangue' (a cassava bread wrapped in leaves).

Figure 4: Cassava bread 'chikwangue' sold at Rungis wholesale market



Source: Photo by [leregisseur](#) on Open Food Facts

United Kingdom: good market for exotic roots

The United Kingdom is a relatively stable market for cassava that can be reached directly from origin. The import volume for cassava varies between 4,000 and 4,500 tonnes with a value of just below €4 million. With 2,600 tonnes of cassava in 2020 Costa Rica has a market share of over 50%. Other supplying countries include India, Sri Lanka and Ghana (each between 200 and 550 tonnes in 2020).

In 2019, [Tesco was optimistic about the soaring demand for exotic vegetables](#), including a 40% growth in cassava sales. But since then the import has stayed relatively stable. The lack of growth indicates that the market may be saturated. However, the sales of exotic vegetables and the food service channels have been affected by the COVID-19 pandemic and Brexit (Britain leaving the EU).

In general, the United Kingdom offers an open market for exotics and diversity in the fresh assortment, so cassava still has growth potential in the future.

Belgium: trade hub for the French market

Belgium plays an important role in the supply of cassava products to France. In general, Belgium re-exports around 40% of its cassava. Around 90% of the re-export goes to France.

The main suppliers of cassava are Cameroon and Costa Rica with varying volumes. In 2020, Belgium registered an increase in imports from Cameroon compared to previous years. The higher re-export numbers in the same year show that most of this additional volume is transported to France. Belgian cassava consumption only accounts for an estimated volume of less than 2,000 tonnes.

As long as Belgium offers convenient logistics for French cassava buyers, the country will maintain its position in the cassava trade.

Portugal: fulfilling local and Spanish markets

Portuguese cassava imports have fluctuated a lot in the past. However, they seem to have stabilised in the last four years, mainly due to the Costa Rican cassava that has gained market share again.

On one side Portugal has a local market to fulfil, possibly influenced by a large share of Brazilians that live in

Portugal. Brazilian people are among the largest consumers of cassava. On the other side, a large share of the cassava import is destined to supply other European countries, especially Spain. In 2020, around 3,000 of the 5,000 tonnes of imported cassava was re-exported.

Tips:

Focus on the countries with a significant population of traditional consumers. From there cassava has best possibilities for growth and to be adopted by other consumer types.

Find import companies at wholesale markets such as [Rungis in Paris](#), [New Spitalfields Market in London](#) and [Marcabarna in Barcelona](#), where there is a relatively large share of multicultural buyers and ethnic products. Additionally you can target companies that are specialised in trading exotic fruit and vegetables - these traders are often well represented in logistical trade hubs such as the Netherlands and Belgium.

4. Which trends offer opportunities or pose threats on the European cassava market?

There is a growing interest in ethnic and healthy vegetables. Cassava is one of the products that is gradually adopted by the mainstream market. To keep this trend going, it is important to present a quality product and promoting the dietary value and all the uses of fresh cassava.

From ethnic to mainstream

Cassava is typically consumed by people in Europe with a Latin, African or Asian background in various forms. These 'ethnic' or 'traditional' consumers are most familiar with this crop and its preparation. But growth in the last years also shows a wider adoption.

The ethnic population in Europe will continue to grow, which means the market for cassava is expanding. But the market is growing faster than the ethnic population, indicating that new channels are being developed. Cassava is gradually being adopted by the mainstream market.

As an exporter you can reach the mainstream markets through specialised buyers that are familiar with the marketing of exotic vegetables and that can help inform consumers about cassava. New or 'non-traditional' consumers require more informative marketing, simply due to the fact that they still lack knowledge about the preparation of cassava. Other obstacles that need to be taken away are the concerns about the toxicity of (uncooked) cassava, and their higher price level compared to potatoes - the most popular starchy root vegetable.

You can try and contribute to increasing the consumer knowledge yourself. For example, on [freshplaza](#) the Costa Rican company [Exportagri](#) claims it has been very successful with a promotional plan for local consumers in different countries and through active participation in trade fairs.

Cassava breeding and crop management improve Africa's chances in Europe

In the current market, Costa Rica has seen the most success in exporting to Europe, but crop improvement will make cassava a more feasible crop for export in other producing countries as well.

To become a successful exporter, you must be competitive and offer quality and continuity. This translates in using superior cassava varieties that have high yields and are resistant to pests. Several international organisations and initiatives are working on improving cassava production.

International cooperation in the Next Generation Cassava Breeding project ([NextGen Cassava](#)) has led to a discovery of new genetic details that could be used in cassava breeding programs and accelerate genetic improvement. NextGen Cassava aims to modernise cassava breeding in sub-Saharan Africa through improved varieties of cassava. One of the organisations involved is the [International Center for Tropical Agriculture \(CIAT\)](#), which assists in the genetic improvement and better pest and disease management.

At the same time, the [International Institute of Tropical Agriculture \(IITA\)](#) launched the [African Cassava Agronomy Initiative \(ACAI\)](#), a 5-year project to increase the availability of technologies to sustainably improve cassava productivity in Nigeria, Tanzania, Democratic Republic of the Congo, Ghana and Kenya.

The attention and funding for improving cassava cultivation will not only contribute to local food security, but also make cassava more suitable as a commercial crop and suitable for export to Europe.

The role of roots and tubers as healthy ingredients

Consumers in Europe are becoming more conscious about healthy eating and are looking for healthier alternatives for common ingredients or products. There is a growing trend of using cassava flour in [paleo](#) or gluten-free diets. Consumers that start using cassava flour will also increase their knowledge on cassava in general. While increasing their knowledge, some of these new consumers may also start experimenting with root cassava. This increasing familiarity and cross-influence between cassava products can contribute to a growing market for fresh cassava.

To interest health-conscious consumers with a healthy root, it is important to show a sustainable production and select quality products. You can adopt [GlobalG.A.P.](#) certification for your production, but unfortunately producing and exporting organic cassava is difficult due to its limited shelf life.

Tips:

Collaborate in cassava projects in your country and improve your knowledge on varieties and production and post-harvest practices. Knowledge is key when you want to export a quality product to Europe. See for example the IDH programme [Cassava – from subsistence crop loss to sustainable cash crop](#).

Promote cassava by showing all the potential uses and preparations of fresh cassava, for example at different trade fairs. For most Europeans cassava is still a fairly unknown product.

Explore the option to market your product with additional consumer information on storage, cooking methods and recipes. Try to work together with dedicated importers and retailers that can help increase consumer knowledge and the appreciation for these ethnic food crops.

Read the [CBI study on trends in the European fresh fruit and vegetable market](#) to see what other trends can offer opportunities or pose threats for fresh vegetables in general.

This study was carried out on behalf of CBI by [ICI Business](#).

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